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Changing Development Concepts

Thirty years ago Deng Xiaoping embarked on the reform, opening up and modernization of China. Deng's reforms triggered tremendous social and economic transformation. Domestically and internationally, technology is increasing China's competitiveness. Culture is also playing a leading role. In other words a coordinated development strategy involves 'innovation' and 'creativity.' If science and technology are considered 'hard power,' then cultural creativity might be regarded as 'soft power.'

The internet is a technological platform that facilitates communication and exchange: for instance, commodities and activities are able to reach markets without being constrained by time and space. This bears special significance for small creative businesses in China. 'Alibaba.com' created a miracle of e-commerce in China. Apart from the successful business model initiated by founder Ma Yun, Alibaba's core system is network technology. Similarly, the rise of Shanda Interactive Entertainment Ltd, a leading interactive content provider in China, can also be attributed to internet technology.

Advertising, search engines, e-commerce and online gaming are the four principal internet revenue streams. The launch of 3G in early 2009 significantly increased the popularity of mobile devices and has shaped new trends in mobile internet. The huge growth of mobile phone users has precipitated a new round of internet use. According to statistics from the Ministry of Industry and Information Technology, China had 384 million net users at the end of 2009. However, despite the fact that Chinese net users account for almost a third its total population, internet access in China is still low compared with the United States and Japan where net use accounts for 77.3 and 78.2 per cent of the total population respectively.¹ Statistics from the Ministry of Industry and Information Technology of P.R. China also show that by end of Sept 2010, telephone users in

¹ See <http://www.internetworldstats.com/stats.htm> [accessed 21 March 2011].

Figure 3.1 The Scale and Growth Rate of Chinese Netizens

Source: Chinese Ministry of Industry and Information Technology, Statistical data 2010

China reached 1.13 billion including 300 million landline users and 830 million mobile phone users. Broadband users increased to 110 million in 2010.²

Integrated development

In a 2002 research paper I identified three development trends of modern industries: industrial clusters, industrial convergence and industrial ecology.³ I called for the elimination of institutional fragmentation to allow the growth of new forms of industry.

As a new industrial development model creative industries challenge conventional economic development models. The significance of this extends far beyond being a new industrial form. It lies in the innovation of the economic system, optimization of industrial structures, an increase in the competitiveness of regions and the construction of a creative society.

²Statistics from the Ministry of Industry and Information Technology of P.R.China. *China Daily*, 29 June 2010. http://www.chinadaily.com.cn/hqgj/jryw/2010-06-29/content_512367.html [accessed 8 March 2011].

³Wuwei Li and Huimin Wang (2002), 'Rational Thinking and Prediction on Industrial Development Trends,' *China Industrial Economics*, 2, 27–30.

Creative industries are a combination of science and technology, culture, industry and the market. This crossover is a basic characteristic of many new types of industries. The concept of cross-boundary convergence requires us to challenge tradition by overcoming fragmentation of industries, and by achieving integration of resources.

Integration is a challenge for government coordination and management. Overcoming boundaries between sectors and achieving coordinated, cross-sector development are key practical issues. I believe that once the approach is changed, government and companies will discover new growth opportunities in modern service industries. Likewise, manufacturing industries will undergo transformation. Highly personalized new products, new services, new technologies, and new business models will be generated.

The establishment of a high-level cross-sector coordinating system is an approach taken in China and elsewhere. For instance, when Britain proposed the creative industries strategy in 1998, the then Prime Minister Tony Blair was the chairman of the Creative Industries Task Force. In Hong Kong, the former Chief Executive Tung Chee-hwa was the one in charge of Hong Kong's creative industries program. In Beijing coordination and management operates through the Beijing Cultural and Creative Industries Leadership Group and its permanent establishment, the Beijing Cultural and Creative Industries Promotion Centre. The Party Secretary of Beijing Liu Qi is the leader of the Group and Mayor Wang Qishan is the deputy leader. Since its establishment in 2006, the Promotion Centre has played an effective cross-sector management role and carried out a series of initiatives to promote cultural and creative industries. These initiatives include formulating development plans, implementation of policies, the designation of cultural and creative industries clusters and training bases, research on policy implementation, coordination and organization of key research projects, establishment of public service platforms, and international exchange and cooperation.

Beyond Cultural Industries

Cultural industries, content industries, copyright industries, and creative industries are often regarded as being similar. Creative industries however were born out of cultural industries and yet they extend beyond cultural industries; they are

shaped by innovative industrial practices with a direct relationship to individual creativity and intellectual property. In comparison with cultural industries more emphasis is placed on integration with primary, secondary and tertiary industries.

The emergence of creative industries policy reveals top-down development strategies closely connected to cultural fields; in addition, government policies have aimed to promote local economic, cultural and social progress and make local industries nationally competitive. Sectors related to culture formed the main content of creative industries policy at an earlier stage; the UK definition of creative industries subsequently became the benchmark for many countries and regions in developing their strategies. From the various definitions and categories of creative industries across the world, we can now identify three common aspirations:

- to utilize creativity in products;
- to generate product value through the use of symbolic meanings;
- to make intellectual property a key asset protected by law.

From the existing categorizations we can see that the scope of activities is both broad and complex. Apart from sectors that have come about as a result of new technology, most creative activities have existed for a long time. Therefore, creative industries are not one specific industry but are a group of industrial categories that share similar characteristics in their contribution to social and cultural development, which have similar potential for economic development and employment, and enjoy special attention from government. They not only include industries whose operational mechanism is based on economic and material capital, but also emerging industries that operate on intellectual capital, cultural capital and social capital.

Creative Industries vs. Traditional Industries

Our understanding of creative industries is not confined by the logic of ‘traditional’ industries. We should examine the meaning and essential nature of creative industries against a background of technological progress, industry convergence and transformation in consumption. There are significant differences between creative industries and traditional industries (see Table 3.1). Creative

Table 3.1 Comparison of Development Logic in Traditional Industries and Creative Industries

	Traditional Industries	Creative Industries
Driver	Hard capital (land, financial capital etc)	Soft capital (knowledge, culture, human resource etc)
Resource	Single use	Repeatable use
Chain	Linear production chain	Circle value chain
Organization	Vertical structure	Flat structure
Orientation	Product value	Consumer value
Revenue	Increasing marginal cost, diminishing marginal revenue	Diminishing marginal cost, increasing marginal revenue
Goal	Economic development	Economic, social and human development

industries highlight the role of soft factors such as culture and human resources; they emphasize repeated and intensive use of resources, have a consumer-centred focus, organizational flexibility and a diversity of industry targets.

This mode of innovative thinking manifests as creative agriculture when applied to traditional agricultural activities; architectural design when applied to construction and environmental planning (architecture, landscape, interior decoration, community planning, exhibition, industrial parks, urban environment, modern business districts, commercial centres, land and sea transportation, bridge engineering and municipal engineering design); and creative tourism when applied to tourism. In this the tourism industrial chain is extended into a cross-sector, multi-level industrial chain to stimulate the transformation of regions through integration with primary and secondary industries. The convergence of creative industries makes it possible to integrate technology and culture with the market so as to extend and expand the development of industries.

Concept of Value Innovation

In an article I wrote in 2007, I pointed out that creative industries are an important means to achieve the Blue Ocean Strategy.⁴ As mentioned in chapter one, the cornerstone of the Blue Ocean is value innovation. Likewise, the core development concept of creative industries is value innovation through the application of new ways of thinking to existing industries. In some senses value innovation represents a fundamental change in the concept of wealth creation. This change is reflected in the new logic of value creation: from product innovation to value innovation, from function value to concept value, and from the Red Ocean to the Blue Ocean.

From product innovation to value innovation

To surf in the Blue Ocean does not necessarily imply that we must look for business opportunities in completely unknown industries. On the contrary, we can also discover a 'blue area' in the Red Ocean. The key is to change the way of thinking by turning from product innovation to value innovation which enables exploration of both the known and the unknown market space. An INSEAD study of more than 100 new business projects finds that 86 per cent of these projects are in the Red Ocean industries and only 14 per cent are Blue Ocean projects. But these Blue Ocean projects eventually contribute 61 per cent of the business profits.⁵ This shows us that the Blue Ocean Strategy is the starting point and practice for innovation of business models with a core strategy of value innovation. The key to success is to provide products and services that can provide unprecedented value for consumers.

Then how to provide new value elements for consumers? The answer is for creative industries to penetrate into and integrate with various industries. We can say that creative industries are a means of achieving the Blue Ocean Strategy.

From use value to symbolic value

Demand is the driving force behind the formation of value. From a consumer perspective the value of a product consists of both its use value and its symbolic

⁴Wuwei Li (2007). 'Creative Industries: The Key to Enter into Blue Ocean', *Wenhui Bao*, 7 Sep 2007.

⁵Kim, W. Chan and Mauborgne, R. *Blue Ocean Strategy: How to Create Uncontested Market Space and Make the Competition Irrelevant*. (Cambridge: Harvard Business School Press, 2005).

value. Use value is the price a consumer is willing to pay for the physical properties of goods so as to satisfy their own basic needs. Symbolic value refers to the price a consumer is willing to pay for the feelings and experiences brought about by the cultural elements and the symbolic meaning embedded in the goods, on top of the price paid for the functional value.⁶ For instance, if an enterprise makes two leather bags of the same design using the same leather material and sews the Louis Vuitton brand to one bag and a general brand to the other, the market price of the 'LV' bag will be more than ten times that of the other. There is a legendary story behind the Louis Vuitton brand. An ordinary cobbler was selected by the French king Louis XIII for his craftsmanship to serve the royal family. The cobbler used the best material and made the best products. Because of this royal association, the symbolic meaning of owning a Louis Vuitton bag relates to concepts of privilege and wealth. By satisfying certain psychological needs of consumers, the Louis Vuitton brand has comparatively high symbolic value.⁷

With economic development and increased income, the shift of focus from use value to symbolic value increases product value and consumer awareness. Manufacturers apply storytelling, symbols and other elements (the brand for instance) to the production and consumption of products. When products become carriers of cultural meaning, their symbolic value is significantly increased.

As shown in Figure 3.2, the increase of concept value can expand demand and create a new market in the Blue Ocean.

From the Red Ocean to the Blue Ocean

For a long time competition and competitive advantage have been major concerns in the strategic management of companies. Guided by Michael Porter's competitive strategic thinking, companies often choose either a strategy of

⁶These intangible elements are subjective.

⁷From a consumer perspective, creative industries create concept value to occupy the market and to make profits by way of using new creative ideas to improve the concept value of products. In contrast to traditional industries characterized by the product-oriented value creation mechanism, creative industries are demand-oriented and customers are both the starting point and the end point of value creation. The value innovation is achieved by means of satisfying customers' cultural demand.

Figure 3.2 The Value Creation Mechanism of Creative Industries

'differentiation' or one of 'lower cost.' They aim to beat their rivals and grab a greater market share. But stimulated by globalization and information technology, the rate of technological diffusion has increased. A large number of homogeneous products have flooded the market and competition has become more intense. The market occupied by companies, the known market space, is the result of intense competition leading to reduced profits and shrinking markets. When many companies carve up market share in competition with each other, this results in a Red Ocean. This metaphor describes the nature of much global competition.

Creative industries are the key to entering into the Blue Ocean not only because they can provide symbolic value for consumers but also because they are capable of penetrating into and integrating with a variety of other industries. This integration of technology, culture, manufacturing, and services helps the growth of industries and the expansion of development space for urban industries. Industries brought about by technology, especially information technology, are showing great vitality which is manifested in their penetration into and integration with traditional cultural industries as well as in high growth. At the same time, the broad application of information technology and the change in the mode of production have led to the breaking down of boundaries between various traditional cultural sectors. This in turn has led to more penetration and integration between various sectors and has turned the concept of market regions into the concept of market place.

The creative industries are a broad industrial group; their output can be transformed into inputs for other industries. Mickey Mouse, Barbie, Harry Potter, Mashimaro, and Hello Kitty are all outputs of this kind. Since the brands were established, they have penetrated extensively into other industries, such as toys, stationery, clothes and accessories, baggage, and food, and have significantly increased the value added of these industries. In addition, music can be recorded to chips that can be integrated into other products to increase their value. Creative marketing can help almost all traditional industries to enter into Blue Ocean and promote the development of a number of related industries.

Concept of People-oriented Development

Diversification is one of the prominent features of creative industries, and stands in contrast to the single economic objective of many traditional industries. Creative industries shift the focus of the development of resources from the object to the subject or more specifically, towards individual creativity. The significance of this shift lies not only in a view of creativity as a precious top-end resource or the ability to turn new ideas into saleable products and services but also in the overall concept of creative industries. Creative industries advocate the release of human potential and the realization of self worth to make people feel happy about their efforts and bring about a return to ‘people-oriented’ values. In this context, what creative industries advocate is a concept of people-oriented development. This development concept has not only changed the value orientation of economic development but also created a new lifestyle combining work with entertainment.

From economic growth to economic development

Growth and development are two different concepts. The transformation from economic growth to economic development is a conceptual change. The objective of development is of benefit to the general population. Economic growth and material wealth can have real social value and human significance only when they are achieved under an economic and social development strategy that aims at promoting the development of everyone in society. As Richard Florida points out ‘our society continues to encourage the creative talents of a minority, while neglecting the creative capacities of many more. Addressing

these issues goes beyond an intellectual or social agenda; it is required work if we wish to generate long-term prosperity by aligning economic growth with the fuller development of human potential.’

Economic growth focuses on quantity. It relates to the increased output caused by variations in input. The connotation of economic development, however, is broader and deeper than simple economic growth. It relates to systemic changes: from small to big, from simple to complex, and from lower to higher. It represents a combination of quantitative and qualitative changes that include not only transformations in production inputs but also elements which are the driving forces of development: structure, quality, efficiency, employment, distribution, consumption, ecology, and environment. Economic development encompasses economic growth whereas economic growth does not necessarily encompass economic development. Economic development not only pays attention to economic scale and improvements in efficiency but to coordination of economic systems, sustainability of development and the sharing of development results. Economic growth is more output-oriented and is focused on the pursuit of quantity and the expansion of scale. It is unsustainable if it is in blind pursuit of high growth at the cost of ecological damage. When economic growth lacks a humanistic approach, it will fall into the trap of pure growth and lose sight of its original objectives.

Creative industries promote human development while promoting economic growth. As defined by DCMS: ‘The creative industries are those industries that are based on individual creativity, skill and talent. They are also those that have the potential to create wealth and jobs through developing intellectual property’.⁸ The core capital of creative industries is individual creativity. Individual talent and skills can become new highlights of economic growth in modern economic development by generating wealth. It is very important that everyone should have the opportunity to realize their talents. Individual creativity should be inspired. It is going to be a powerful force in promoting social and economic progress as well as representing a huge potential for change in China’s economic development model. In the near future, creative industries will become strategic industries that will give free rein to the creative talent of the Chinese people and improve their quality of life.

⁸http://www.culture.gov.uk/what_we_do/creative_industries/default.aspx [accessed 8 March 2011].

I once wrote an article on this topic entitled ‘Creativity is not the Sole Ownership of a Master.’⁹ I argued that ‘the wisdom of three cobblers is worth that of a master’. Today, the internet provides a convenient communication channel and enables creative output to be rapidly transformed into productivity, wealth and even employment. In the course of this process, the social value of the individual, whether he is a celebrity or an ordinary person, can be realized and individual self development furthered.

Economic growth is only a means, not an end in itself. The promotion of human progress is the fundamental purpose of economic development. In a society relatively rich in material resources, cultural demand is on the rise. Creative industries can provide products the cultural entertainment function of which provide a model of development for humankind featuring the double ‘dividends’ of cultural and material benefit.

From object resources to subject resources

Resource is a broad concept which includes the material and the intangible. Intangible resources consist of the accumulated wealth of human knowledge, including cultural heritage, human thoughts and scientific achievement. Material resources are tangible resources provided by nature, such as minerals, land and resources in the form of factory buildings, farmland and energy. Generally speaking, resources developed and utilized by conventional traditional industries are largely material. Creative industries, on the other hand, focus on the development of intangible assets: they convert intangible resources into capital, thereby promoting economic development. This kind of regenerated capital is characterized by low consumption and high value added.

Intangible resources are capable of being transformed into development capital in order to bring about economic benefits. Folk legends and elements of social life, for instance, are resources which can be developed and used for economic growth. The *Harry Potter* series is a classic example. Statistics show that the economic turnover of industries related to *Harry Potter* is over US\$200 billion.

⁹Wuwei Li, ‘Creativity is not the Sole Ownership of a Master,’ *Wenhui Bao*, 22 Mar 2006.

In the age of the material economy, hard capital occupied the dominant position. If you had land, factory buildings and money, you held competitive advantage. In the age of the creative economy, soft capital becomes the key factor in obtaining competitive advantage. For instance, a brand is soft capital with high value added. Owning a brand can occupy more market share and bring profits that exceed those of land, factory buildings and labour. In the knowledge economy, social capital, information capital, cultural capital and intellectual capital are the important factors in production. There are structural changes in the core drivers of some new industries. Intangible capital has become the main capital form of the new industries. The core capital of creative industries consists of knowledge and wisdom rather than labour and raw materials in the traditional sense.

With economic and social development, the form of capital is also evolving. The shift in human development from material to intangible resources is inevitable. Material resources are limited whereas intangibles are infinite. South Korea promoted the idea of ‘limited resources, unlimited creativity.’ From the perspective of development, the development and application of intangibles is in accordance with the scientific concept of low pollution and high output.

Creative capital can be used repeatedly and infinitely. In other words, creative capital can represent one input and multiple outputs. The content value of creative products can be repeatedly consumed and used. Examples include Shakespeare’s classic *Hamlet*, Hugo’s *Les Miserables*, China’s *Dream of Red Mansions* and *Butterfly Lovers*. The passage of time has not affected the content. By means of modern technology, these beautiful stories can be made into opera, ballet, comics and local dramas. They can also be made into films, recorded on CDs, and even adapted into animations to expand their economic value. The ancient Chinese story of *Hua Mulan* was used by Disney to make a bestselling animated movie.

Once a movie is successful it can reap profit in sales of DVDs, videos, TV rights, souvenirs, and clothes and accessories. In the animation industry, the ratio of the original product and its merchandising can reach 1:3 or even 1:5. Disney’s animation productions have theme parks, consumer goods and media products attached to them. The Disney characters appear on books, stationery, food, clothes, and toys. The price of a consumer good with the logo of a cute Mickey Mouse is much higher than that of a similar consumer good without that logo. Statistics show that audio-visual products may generate income

from merchandising four times that of the original products. This means that the product value of US\$500,000–600,000 can generate US\$2 million in merchandising.¹⁰

Creative capital can quickly generate large-scale profits. Advertising, architecture, arts and antiques, crafts, design, film, interactive leisure software, music, performing arts, publishing, software, broadcasting, games and online games, animation, DV, Flash, SMS, and mobile video, rely on creative ideas. Dissemination and marketing rely even more on technology which can rapidly distribute products and stimulate new waves of consumption. High returns on investment can be accumulated in a short period of time.

From working hard to working happily

In *The Rise of the Creative Class*, Richard Florida coined the 3T concept (Technology, Talent and Tolerance). The ‘creative class’ is the generic term for people working in occupations that utilize creativity. It includes scientists and engineers, poets, artists, designers, health and law practitioners, and people working in hi-tech and knowledge-intensive industries. In China these people are called ‘*xinxin renlei*’ or ‘new human beings’ who have new ideas and different attitudes towards life. Their creative spirit and risk-taking are having a positive influence on the younger generation; their work and activities constitute the most dynamic elements of urban landscapes; their lifestyles and values are impacting on the development of cities and communities. With numbers on the rise, more changes are expected to future lifestyles and working cultures.

Creative talents

The development of creative industries relies on creative abilities. Ability and intellectual property are the source and core of the creative industries value chain. Lack of innovative ability has become one of the bottlenecks in the development of creative industries. At present, China’s cultural and creative

¹⁰ Xavier Greffe, X. (2008), ‘*New Business Models for Culture*,’ Conference paper at Griffith University, Australia. Oct. 2008. http://www.griffith.edu.au/__data/assets/pdf_file/0016/100645/Greffe-Seminar2-Text.pdf

industries are lacking in people who are not only familiar with the content of cultural and creative industries but who are also good at management and operations. In other words, people with skills in commercialization and marketing are in high demand. But what kind of skill sets do creative industries need? How are they to be cultivated? The solution is education, innovative education.

John Howkins says, 'The most important factor in a creative economy is education. There is a high correlation between a country's education level and the size and strength of its creative economy.'¹¹ Establishing an innovative education system should be addressed as a national strategy with a view to revitalizing national cultural industries.

Creative ideas can be copied and money can be returned on bank loans. But creative skills are hard to find. Creative industries are an industrialized business operation system covering the process of creative planning, production, marketing and consumption. Designers, production crews, agents, marketing professionals and managers are all professionally trained.

What society really needs is a combination of creative skills and practical capabilities. Richard Florida points out that every creative person in today's society should have three educational qualifications or receive three levels of education. The three-level education refers to art education, technology education and business-related training. People with this educational background will form the competitive and innovative skill base needed in today's environment.

The success of creative industries over the past decade in developed countries such as Britain and Australia can be attributed to an emphasis on the cultivation of creative skills. The London Business School and The University of the Arts London have been collaborating to train people in arts and management. The Greater London Authority has invested 50 million pounds in this program in which students of the two educational institutions are trained together. The cultural and creative industries in the United States are global leaders. More than thirty universities offer arts management courses and produce a large number of graduates with degrees in planning, marketing and management.

¹¹ John Howkins' Introduction to Li Wuwei's book *Creative Industries are Changing China*, China: Xinhua Press 2009, p. 6.

In Australia, the Queensland University of Technology (QUT) established the world's first Faculty of Creative Industries in 2001. The faculty offers interdisciplinary courses that cover more than a dozen disciplines and combine creative arts (e.g. performing arts, media and journalism) with IT-based design (e.g. fashion, games and media design). These courses are also combined respectively with education, law, business and IT to provide joint-degree education. In addition, the faculty offers various short-term training courses and summer school programs related to the creative industries. The teaching curriculum focuses on applied courses and aims at meeting the employment market demand. It provides a balanced education and training in both theory and practice. Because of this, QUT is known as 'a university for the real world.' The university has the largest number of graduates each year and its graduate employment rate is well above the national average for Australian universities.

China's tertiary education is not far behind. In recent years, around sixty universities nationwide have provided courses related to cultural and creative industries. Animation and games are the fastest growing sectors of these courses. All this has effectively alleviated the talent shortage in terms of quantity. However, there is an imbalance with a scarcity of high-end creative skills. As we know, cultural and creative industries are inter-disciplinary, combining elements of culture, arts, economics, management, and science and technology. They are both broad-based and highly specialized. Universities and research institutions should provide targeted education for different levels of talent in design, production, management, marketing, and research by taking advantage of the rich resources of creative disciplines and exploring the potential of interdisciplinary education.

The Communication University of China (CUC), a top university of media and communication in China, is an important training ground for creative industries. Its curriculum, approach and educational philosophy provide a teaching model for other Chinese universities. CUC makes sure that its courses are at the forefront of the industry and can cater to industry specifications and market demand. Its courses in creative media, international cultural trade and cultural industry management reflect industry sectors in urgent need of new skills. CUC's three-level bachelor, masters and PhD degrees coupled with the effort to open the university to creative practitioners and business leaders to expand networking and to share ideas and experiences is catering to the demand for innovative and capable marketing and management skills which have risen in demand as a result of the emergence of creative industries.

Peking University has had success in nurturing practical skills. It has a collaborative training program with Time-Warner to produce marketing and management personnel for the cultural industries. This project adopts a 'full-interaction' teaching and practice mode which includes case studies, market surveys, research reports, simulation exercises and experiments. In both simulated and real situations, students put into practice their knowledge and skills under the guidance of successful industry professionals. This kind of training highlights the importance of practical skills.

In 2005, the Shanghai Theatre Academy (STA) established the School of Creative Studies, the first of its kind in China. The school offers specialized courses in creative skills which include management, gaming and animation, creative media, and visual communication. The School of Creative Studies has been actively engaged in the construction of a discipline system and has broken out of the traditional teaching model and established a base of teaching, research, and production for creative education. It provides various kinds of practice bases and platforms for students to consolidate and deepen their classroom knowledge, develop their personality, improve their practical skills and potential for innovation.

The formation of the creative class relies on a tolerant diversified culture and an enabling social environment. The development of creative education needs a collaborative approach: government support, corporate coaching, tertiary education, and private education. We need to further expand social tolerance and create a more relaxed cultural environment if we are to encourage bold and controversial creative ideas. This will help liberate the workers in the creative industries from ideological restraints and activate their creativity.

Creative education is a systematic project. It needs the collaborated effort of educational institutions, business and the community for its coordinated development. Innovative education will pave the way for China's march towards the creative economy.